

FasCard Admin Site - Loyalty Groups

Overview

The Loyalty Groups page is only accessible by users with **Admin** or **Loyalty Settings** privileges. This page is used to configure Loyalty user groups in order to track usage and or provide group discounts. Users with **Loyalty Account** privileges may assign Loyalty users to a group.

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Managing Loyalty Groups

Navigating to the Loyalty Groups page under the Loyalty tab will display a list of all configured Loyalty Groups- a description of the columns displayed on this page can be found below. Loyalty groups allows users to configure groups to which individual Loyalty accounts can be assigned. Accounts can be assigned to groups manually on the [Loyalty Accounts](#) page or using [coupons](#). Loyalty Groups may have an associated discount which will then benefit the designated accounts associated with the Loyalty group. Loyalty Groups can be used to monitor Loyalty activity and contribute to the [Loyalty Totals](#) report to display value both added and spent from Loyalty Groups.



Click any header to sort the list of Loyalty Groups by that header.

Settings Setup Users System Reports **Loyalty**

Accounts Loyalty Settings **Loyalty Groups** Cards

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Group Name	Discount	Members
Swim Team	5%	9
Managers	100%	0
Test Group	0%	1
Prarie	0%	0

Add New

COLUMN	DESCRIPTION
Group Name	This column indicates the configured name of the Loyalty Group.
Discount	This column indicates the configured discount applied to members of the Loyalty Group.
Members	The column indicates the number of Loyalty Accounts associated with the Loyalty Group.

Add or Edit a Loyalty Group

ADD A LOYALTY GROUP

To add a new Loyalty Group, navigate to the Loyalty Groups page under the Loyalty tab and perform the steps below.

1. Click **Add New**.
2. Enter the desired name in the **Group Name** field.
3. Enter the desired discount percentage (if any) in the **Discount %** field. (Do not use % sign.)
4. Click **Save** to confirm group creation or click **Cancel**.

The screenshot shows the 'Loyalty' tab interface. At the top, there are navigation tabs: Settings, Setup, Users, System, Reports, and Loyalty. Under the 'Loyalty' tab, there are sub-tabs: Accounts, Loyalty Settings, Loyalty Groups (selected), Cards, and Coupons. Below the sub-tabs is a table with the following data:

Group Name	Discount	Members
Dog Lovers	18%	3
Employee Discount Test	20%	9

Below the table is an 'Add New' button. Underneath is a section titled 'New Loyalty Group Details' with the following form fields:

Group Name:
Discount %:

At the bottom of the form are three buttons: Save, Delete, and Cancel.

EDIT A LOYALTY GROUP

To add a new Loyalty Group, navigate to the Loyalty Groups page under the Loyalty tab and perform the steps below.

1. Select the Loyalty Group to edit from the group list.
2. If applicable, edit name in the **Group Name** field,
3. If applicable, edit the desired discount percentage in the **Discount %** field. (Do not use % sign.)
4. Click **Save** to confirm group edits or click **Cancel**.

DELETE A LOYALTY GROUP

To delete a Loyalty Group, navigate to the Loyalty Groups page under the Loyalty tab and perform the steps below.

1. Select the Loyalty Group to be deleted.
2. Click **Delete**.
3. Click **OK** when prompted to confirm deletion or click **Cancel**.